

FINANC 4820/7820
The Mizzou Investment Fund Management Program

University of Missouri
Robert J. Trulaske, Sr. College of Business

Introduction: The Mizzou Investment Fund Management Program is a student-run investment portfolio that allows undergraduate and graduate students of the University of Missouri to participate in the decision making and management of an endowment fund. Within the framework of an academic class, students analyze securities, set asset allocation targets, and make investment decisions for a portfolio of investment securities. Prerequisites: The class is a dedicated course in the Department of Finance of the College of Business. At the time of application, undergraduate applicants are encouraged (but not required) to have completed or be enrolled in the following courses:

Recommended Background Courses:

FINANC 3000 - Corporate Finance

FINANC 4020 - Investments

FINANC 4120 - Security Analysis [or] FINANC 4620 - Investment Strategy of Warren Buffett

Benefits of the Program: Participation in the Mizzou Investment Fund Management Program enhances a student's career opportunities by developing critical thinking and leadership skills. While a career in the investment management field is an obvious choice of students participating in the program, students planning for careers in other fields can benefit from the skills learned and developed in the course. For example, the financial analysis performed when analyzing a company for investment is useful to commercial loan officers of a bank and leadership skills developed by student managers of the fund are useful to business executives and government officials of all types.

Description: Over the course of the semester, students identify and critically analyze securities for potential investment in the fund. Student analysts will develop comprehensive analysis reports and present their recommendations to the rest of the class for discussion and investment decisions. Each student must maintain awareness of economic and market conditions during the semester, especially keeping vigilant regarding his or her selected securities. Officers are also selected to manage key fund activities. The course instructor oversees the class officers and critiques reports and presentations.

Student Evaluation: Evaluation of student performance by the instructor contains both subjective and objective components and is based on factors such as students' written security analyses, presentation of the analyses, active participation during the class, and effective leadership (for officers).

Admission: Admission to the Mizzou Investment Fund Management Program is determined through a competitive application process. Students accepted into the program may then enroll in the appropriate (undergraduate or MBA) section of the course. Refer to the Application for Admission for the relevant application deadline.

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Undergraduate Application for Admission (Fall 2022 Class)

Application deadline: 5:00 P.M., March 18, 2022

Please turn in the completed application form to the Department of Finance, 401 Cornell Hall. Students accepted into the IFM Program will be notified by email shortly after the deadline listed above.

Name: _____ Concentration: _____

Email: _____ Degree (e.g., BSBA): _____

Indicate the courses that you have completed or will complete prior to the IFM enrollment term.

- ___ FINANC 3000 - Corporate Finance
- ___ FINANC 4010 - Financial Management
- ___ FINANC 4020 - Investments
- ___ FINANC 4030 - Financial Intermediaries and Markets
- ___ FINANC 4110 - Financial Management Policy
- ___ FINANC 4120 - Security Analysis
- ___ FINANC 4130 - Management of Financial Institutions
- ___ FINANC 4185 - Problems in Finance
- ___ FINANC 4220 - Portfolio Management
- ___ FINANC 4310 - Financial Modeling and Databases
- ___ FINANC 4320 - Financial Futures and Options
- ___ FINANC 4450 - Financial Ethics and Professional Standards
- ___ FINANC 4500 - Principles of Real Estate
- ___ FINANC 4510 - Real Estate Appraisal
- ___ FINANC 4520 - Real Estate Finance and Investment
- ___ FINANC 4530 - Real Estate Portfolio Analysis and REITs
- ___ FINANC 4620 - Investment Strategy of Warren Buffett
- ___ FINANC 4630 - Introduction to Risk Management and Insurance
- ___ FINANC 4632 - Principles of Commercial Property and Liability Insurance
- ___ FINANC 4640 - Enterprise Risk Management
- ___ FINANC 4710 - Topics in International Finance
- ___ FINANC 4720 - International Finance
- ___ FINANC 4830 - Chartered Financial Analyst Exam Review Course
- ___ FINANC 4840 - Angel Capital Education Program

GPA at MU: _____ Expected graduation date: _____

Signature: _____ Date: _____

Please attach the following items:

1. A one-page statement detailing your background and why you are interested in this program
2. A current resume